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RIT

Oracle Supervisor Self-Service Manual

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Overview:

RIT Supervisor Self Service provides managers and supervisors online information and tools to enable them to make time sensitive personnel decisions and transactions.

How to Access Oracle

From an On-Campus Location

1. Using your Internet browser, go to the URL https://mybiz.rit.edu

2. If you are using a Macintosh computer, the only supported browser is Safari. Individuals using unsupported browsers may be able to log on, however, the browser may not interact properly.

3. The URL in step #1 will take you to the RIT Oracle Applications Sign-On Page. Enter your Oracle User ID and password and click on the "Login" button. This will take you to your Oracle home page.

From an Off-Campus Location

Note: VPN connection is required to access Oracle Supervisor Self Serve

1. VPN (virtual Private Network) is used to secure transmissions across the Internet. Using VPN technology makes your home/remote computer appear as if it is attached directly to the RIT network, even if you are using an outside ISP such as Road Runner, DSL, or AOL. To obtain the Virtual Private Network service instructions, visit the VPN web page at http://www.rit.edu/its/node/135

2. Once you have downloaded and logged in to VPN, access an Internet browser and go to URL https://mybiz.rit.edu

3. The Oracle Application's sign-on page will display. Enter your Oracle User ID and password and click on the "Login" button. This will take you to your Oracle home page. Your Oracle User ID and password may be different from your RIT Computer Account login.

How to Use the Oracle Supervisor Self Service Applications

After you have logged into your Oracle Home Page, you will see a number of "responsibilities" listed including RIT Supervisor Self-Service.

After clicking on your responsibility, you will see your sub function links as discussed below.

Person Search Hints
If you wish to build a list of people in your organization, type the LAST name of the person and click GO located at the top of the page before the Advanced Search Link. Once you see the Search Results, check the box before the desired person's name and ADD TO MY LIST. A Confirmation message will appear.
Hint: You can substitute the wildcard character "%" in any part of the name field. For example, if you are searching for George Smith, you can enter "Geo%" in the first name field and "Sm%" in the last name field.
After you have added everyone to your list, you can exit out of this screen using BACK or HOME. Once you go back to the Main Page, whenever you enter the Personal Information View, click on MY LIST. The people in the built list will be present.

NOTE: You must go through the person search process periodically to add new people to your list because they do not appear automatically.

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My Employee Information

By clicking on the My Employee Information link, you should immediately see your direct reports. To view the subordinates of your direct reports, click on the + next to their supervisor's name to expand the list. You have access to your direct reports and their subordinates automatically as displayed on the Human Resources Supervisory Organization Chart. http://www.rit.edu/fa/humanresources/content/university-organizational-charts. Note: the RIT Organization Chart is updated daily from Oracle.

There are two icons next at the end of each row for each employee, Action and Details.

To view employee demographic information click on the Action icon.

From the Details icon you will be able to view Employment, Salary and Performance current and historical information displayed as tabs. On the Employment tab you will see Job Assignment information with effective start and end date for each assignment. On the Salary tab you will see all Base Salary changes with effective start and end dates. On the Performance tab you will see all annual Performance ratings and the dates they were received in HR.

Change Supervisor

You can change an employee's supervisor, reassign an employee's direct reports to a new supervisor or assign new direct reports to the selected employee through this link. Click on the Action icon to make supervisory changes.

The Supervisor field in Oracle controls which subordinates show up under a manager Supervisor Self Service hierarchy which is also used to create the person hierarchy in Human Resources Supervisory Organization Chart. ***This field is extremely important for controlling security in the self service application; therefore, it should be kept up to date at all times.***

1. To make supervisory changes for a specific employee, click the Action icon to the right of their name.

    a. You may now enter a new supervisor for the employee. Enter the name as Last Name%First Name% (eg Smith%John%). You may be prompted to select the person from a list.

    b. If the employee has direct reports, you can either keep them with the selected employee or reassign them to a new supervisor on this screen. Click on the Assign to all to change all the employees or you can individually change the supervisor for each direct report.

    c. You may also add new direct reports to the selected employee. The choice of employees comes only from your existing hierarchy. This functionality is useful if you would like to structure a re-organization of reporting relationships within your department.

2. Once you have finished making your changes, press the NEXT button at the bottom of the page. You will then see a REVIEW screen so that you can VERIFY the existing structure before submitting through the ON-LINE APPROVAL (Workflow) process.

3. Comments to Approver: This box is used to type an appropriate message to display in the email sent to the approver.

4. Approvers: The final approver is always the submitter's immediate supervisor. Additional approvers can be added in front of the final approver. The final approver cannot be changed or deleted from the list.

5. People to Notify: Individuals other than those involved in the transaction can be added to this list in order to receive an FYI email notification one the changes have been approved.

Once you submit your changes, they will route to your immediate supervisor for review and approval. The changes WILL NOT be committed to Oracle until the change has been approved. Once approved, a notification will go to the new supervisor.

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List of Reports

The following reports are available for you to run through RIT Supervisor Self Service. Several require date parameters. Based on the employee types that are in your reporting hierarchy there may be cases where your report does not return data (for example, faculty only reports if there are no faculty in your hierarchy).

Costing History

Lists the history of the general ledger account number and percentages to which each employee was charged.

- Employee Number
- Person Name
- Costing Date From
- Costing Date To
- Costing Proportion
- Cost Code
- RIT Department
- RIT Object
- Organization Name

Costing History by Employee

Returns the same data as in the Costing History, but allows you to select a specific employee number.

- Employee Number
- Person Name
- Costing Date From
- Costing Date To
- Costing Proportion
- Cost Code
- RIT Department
- RIT Object
- Organization Name

Current Assignment and Salary Details

Lists the employee's most current salary and limited position data.

- Organization
- EE (Employee Number)
- Last Name
- First Name
- Adjusted Hire Date
- Salary Change Date
- Salary End Date
- Salary/Pay Rate
- People Group
- Employment Category
- Standard Hours
- Manager Flag
- Weeks (Non-Exempts)
- Months (Exempts)
- Email Address
- Supervisor Name
- Position Name and PC
- Job Category

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- Location
- Assignment Status
- College Division
- Effective Date of Rank
- Rank
- Tenure Date
- Assignment FTE
- Tenure Status
- Payroll Name
- Grade
- Grade Min
- Grade Mid
- Grade Max

Emergency Contacts

Lists the contact information as entered by the employee.

- College Division
- Employee Name
- Organization Name
- Primary Contact
- Contact Type
- Contact Full Name
- Contact Phone Number
- Contact Phone Type
- Employee Number

Employee Personal Data

Lists personal data (e.g. home address) for each employee as reflected in Oracle.

- Organization
- EE (Employee Number)
- First Name
- Last Name
- Address
- City
- County
- State
- Postal Code
- Email Address
- Phone Number
- Phone Type
- Adjusted Hire Date
- College Division

Exempt Assignment Details, Salary and Costing

Lists the general ledger account number, percentages, and calculated amount charged to each employee.

- College Division
- Organization
- Person Name
- Employee Number
- Adjusted Hire Date

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- Salary Change Date
- Annual Salary
- Salary * Proportion
- Costing Proportion
- Cost Code
- Costing Date From
- Costing Date To
- RIT Department
- People Group
- Grade
- Grade Min
- Grade Mid
- Grade Max
- Employment Category
- Standard Hours
- Manager Flag
- Weeks (Non-Exempts)
- Months (Exempts)
- Email Address
- Supervisor Name
- Assignment Start Date
- Position Name and PC
- Job Category
- Location
- Assignment Status
- College Division
- Rank
- Tenure Status
- Assignment FTE
- FTE * Proportion
- Listserv Address

Faculty Contract Renewal Info

Lists all information contained in the annual Faculty Salary Notification Letters

- College Division
- Employee Number
- Full Name
- Salary Change Date
- Current Salary
- Increment
- New Salary or Wage Rate
- Organization Name
- Position Name
- Job Name
- User Assignment Status
- Rank
- Tenure Date
- Effective Date
- Tenure Status
- Lecturer Ranks Appt Start
- Lecturer Ranks Renewal Date

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- Lecturer Ranks Term

Faculty Degree and Rank Info

Lists all degree and school information for faculty as reported in the RIT HR System.

- College Division
- Employee Number
- Full Name
- Assignment Organization Name
- Terminal Degree
- School Name
- Rank
- Position Name
- Job Name
- Location Name
- Tenure Status
- Tenure Date

Faculty Ranks

Lists the most current rank data for each faculty member in your organization.

- Assignment Organization Name
- Employee Number
- Last Name
- First Name
- People Group
- Position Name
- Email Address
- Location Name
- Job Name
- Employment Category
- Rank
- Tenure Date
- College Division
- Tenure Status
- Effective Date of Rank
- Last Update to Rank or Tenure
- Effective Date

Future Dated Salaries

Lists any approved future dated salary changes (employees without future dated salaries will NOT show up on this report.)

- College Division
- Employee Number
- Person Name
- Salary Change Date
- Salary Amount
- Salary Change Reason
- Approved Flag
- Organization Name
- Assignment Start Date
- Assignment End Date

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- Position Name
- Job Name

Lump Sum (Merit Increases) – Merit Bonus Payments report

Lists all employees who received a Merit Bonus payment as part of the Merit planning process

- Employee Number
- Person Name
- Element Effective Start Date
- Element Effective End Date
- Amount
- Organization
- College Division
- People Group

Non-Exempt Assignment Details, Salary and Costing

Lists the general ledger account number, percentages, and calculated amount charged to each employee.

- College Division
- Organization
- Employee Number
- Person Name
- Adjusted Hire Date
- Salary Change Date
- Pay Rate
- Annual Pay * Costing Percentage
- Costing Proportion
- Cost Code
- Costing Date From
- Costing Date To
- RIT Department
- People Group
- Grade
- Employment Category
- Standard Hours
- Number of Weeks
- Manager Flag
- Months (Exempts)
- Email Address
- Supervisor Name
- Assignment Change Date
- Position Name and PC
- Job Category
- Location
- Assignment Status
- Assignment FTE
- FTE * Proportion
- Internal Address

Open and Filled Positions (Position Control Report)

Lists all open and filled positions which are within your area of manager self service access.

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- College Division
- Employee Number (Emp #)
- Last Name
- First Name
- Full Name
- RIT Position Flexfield
- Organization
- Position Dept
- Assignment Status
- Employee Current Salary
- Position Budget
- Position Control Number
- Position Funding Type
- Assignment FTE
- Position FTE
- Position Title
- People Group
- Job Category
- Assignment Standard Hours
- Assignment Standard Months
- Assignment Standard Weeks
- Temp Position End Date
- Job Code
- EEO Code
- Voting Block

Oracle Responsibilities Report

Lists all Oracle Responsibilities for each employee. This is a list of all the various access the employee may have including General Ledger, Human Resources and Purchasing.

- College Division
- Assignment Organization Name
- Employee Number
- User Name
- Employee Name
- Supervisor Name
- Responsibility Name
- Responsibility End Date
- Position Name
- User Assignment Status
- Email Address

Overload per a Certain Period

Lists all people with an overload pay element being charged to a general ledger number within your organizational hierarchy during the current quarter.

- Employee Number
- Full Name
- Element Name
- Amount Contract Amount
- Course Number
- Element Effective Start Date

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- Element Effective End Date
- Element Costing
- Department Code
- GL Department Name

Position Details

Lists the position and job data for each employee as reflected in Oracle.

- College Division
- Employee Number
- Last Name
- First Name
- Position Name and PC
- Position Title
- Position Number
- Position Funding
- Organization
- Job Category
- Supervisor Name
- Position Department
- Position FTE
- Person(Assignment) FTE

Salary, Costing, and Assignment Details

Lists the general ledger account number and percentages charged plus other assignment and salary data.

- Organization
- Last Name
- First Name
- Employee Number
- Adjusted Hire Date
- Salary Change Date
- Annual Salary
- Costing Proportion
- Cost Code
- Costing Date From
- Costing Date To
- Costing GL Department
- People Group
- Grade
- Employment Category
- Standard Hours
- Manager Flag
- Weeks (Non-Exempts)
- Months (Exempts)
- Email Address
- Supervisor Name
- Position Name and PC
- Job Category
- Location
- Assignment Status
- College Division
- Rank

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- Tenure Date
- Assignment FTE
- FTE * Proportion

Salary History Report

Lists salary information going back to 1999 and any future dated salaries.

- College Division
- Organization
- Employee Number
- Person Name
- Position Name
- Job Name
- Grade Name
- Salary Change Date
- Annual Salary

Special Assignment Per a Certain Date

List all people who are receiving a special assignment pay element during a specified period.

- Employee Number
- Full Name
- Element Name
- Element Effective Start Date
- Element Effective End Date
- Input Value Name
- Element Costing
- GI Department Name

Staff Degree Information

Lists all degree and school information for staff as reported in the RIT HR System.

- College Division
- Employee Number
- Full Name
- Assignment Organization Name
- Terminal Degree
- School Name
- Rank
- Position Name
- Job Name
- Location Name
- Tenure Status
- Tenure Date
- People Group

Summer Salary Per a Certain Date

Lists all people with a summer salary pay element being charged to a general ledger number within your organizational hierarchy during the current quarter.

- Employee Number
- Full Name
- Element Name
- Amount

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- Contract Amount
- Element Effective Start Date
- Element Effective End Date
- Element Costing
- Department Code
- GL Department Name

Export Reports to Excel

These reports are all exportable to Excel. It is preferred to export the report rather than to "print" the report because many of the reports do not print to fit a standard size sheet of paper.

1. In the Actions Box on the left column, select "Export."
2. From the drop-down menu, select "Microsoft Excel Workbook (*.xls)"
3. Click the "Export" button on the right.
4. Click "Click to view or save."
5. You may choose either "Open" or "Save." "Save" is recommended.
6. Choose a file name and a folder where you would like the report saved.
7. Click on "Open" to view the file.
8. Click on "Enable Macros."

Note: If you are having trouble opening the exported file, check your Excel Macro Security Settings – Tools/Macros/Security. Set to Medium.

Troubleshooting Reports:

If your reports don't appear to be returning all the necessary rows, before calling for assistance, check your report settings by doing the following:

After you run your report, click the PREFERENCES link at the top right hand side of the page.

Make sure that none of the boxes under the Query Governor Section are checked:

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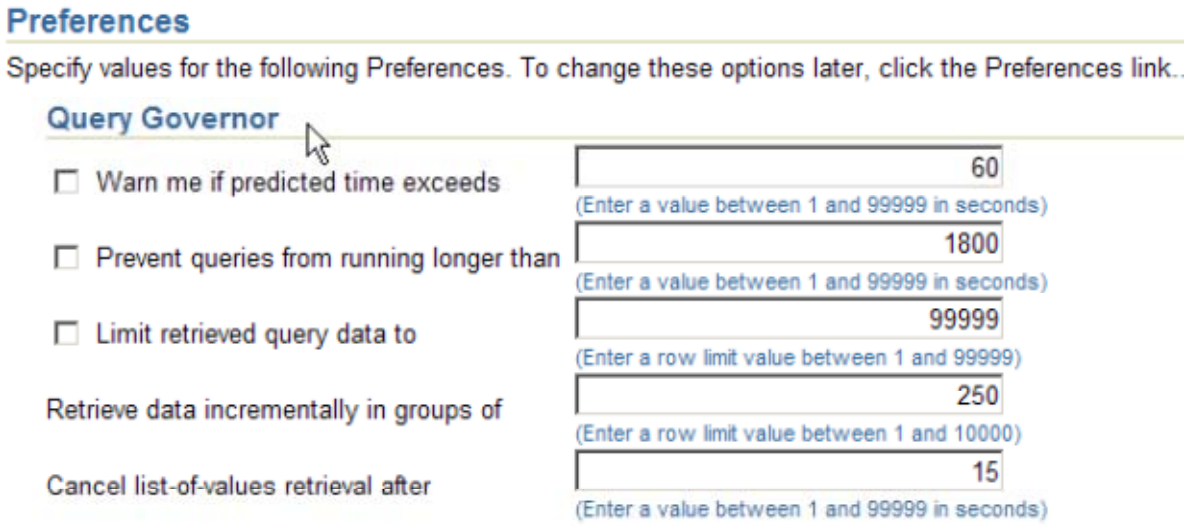
Preferences
Specify values for the following Preferences. To change these options later, click the Preferences link..
Query Governor
Warn me if predicted time exceeds
60
(Enter a value between 1 and 99999 in seconds)
Prevent queries from running longer than
1800
(Enter a value between 1 and 99999 in seconds)
Limit retrieved query data to
99999
(Enter a row limit value between 1 and 99999)
Retrieve data incrementally in groups of
250
(Enter a row limit value between 1 and 10000)
Cancel list-of-values retrieval after
15
(Enter a value between 1 and 99999 in seconds)

Leave all other settings as they have defaulted

Click the APPLY button and re-run your query.

If your reports are still not returning the data you expect, or if you are still having trouble, please contact Customer Support at 475-4905. There may be an issue with your security profile setup or your data as shown in the Organizational Hierarchies at http://www.rit.edu/fa/humanresources/content/university-organizational-charts .